

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 11 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	0	11	5	4	20
Estimated Number of Attendees	0	328	88	90	506
Estimated Number of Persons Provided Enrollment Assistance	0	11	15	40	66
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	2	0	0	2	4
Estimated Number of Attendees	1,300	0	0	850	2,150
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	2	0	0	2
Estimated Number of Attendees	0	320	0	0	320
Estimated Number of Persons Received Any Enrollment Assistance	0	318	0	0	318
Enrollment Assistance with Medicare Programs(s)	0	1	0	0	1
Enrollment Assistance with Part D	0	315	0	0	315
Enrollment Assistance with LIS	0	2	0	0	2
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	1	1
Estimated Number of Attendees	0	0	0	400,000	400,000
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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	Q1	Q2	Q3	Q4	
<b>Other Print Activity (newspaper articles, fliers, pamphlets, etc.)</b>					
Total Number of Print Activities	0	0	0	0	<b>0</b>
Estimated Number of Targeted Persons Reached	0	0	0	0	<b>0</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	2	13	5	7	<b>27</b>
Total Hours for Length of Activities	7.00	94.35	25.00	21.30	<b>147.65</b>
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	2	0	1	<b>3</b>
Total Hours for Length of Activities	0.00	16.00	0.00	4.00	<b>20.00</b>
<b>Other Presenters</b>					
Total Presenters	0	0	1	0	<b>1</b>
Total Hours for Length of Activities	0.00	0.00	5.00	0.00	<b>5.00</b>
<b>Area of Focus</b>					
		3	6	3	
Dual Eligible with Mental Illness	2	1	0	1	<b>4</b>
Employer Termination - COBRA	1	0	0	1	<b>2</b>
General HICAP Information	2	12	5	7	<b>26</b>
Grievances / Appeals - Plan Issues	0	0	5	3	<b>8</b>
Long-Term Care / Insurance	0	1	4	1	<b>6</b>
Low Income Subsidy (LIS) / Application Assistance	1	11	5	6	<b>23</b>
Medicare (Parts A & B)	2	6	5	6	<b>19</b>
Medicare Advantage (Part C)	2	6	5	6	<b>19</b>
Medicare Fraud / Abuse	2	11	5	6	<b>24</b>
Medicare Prescription Drug Coverage (Part D)	2	8	5	6	<b>21</b>
Medigap / Medicare Supplements	2	6	5	6	<b>19</b>
Non-Medicare Fraud/Abuse	0	0	0	0	<b>0</b>
Other Topics / Issues (Health Specific)	0	1	0	0	<b>1</b>

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	2	10	5	6	23
QMB/SLMB/QI	0	1	1	2	4
Volunteer Recruitment	0	0	1	5	6
<b>Targeted Audience</b>					
African American	1	6	1	6	14
American Indian or Native Alaskan	0	0	0	2	2
Asian Indian	0	0	0	1	1
Caucasian	1	13	3	7	24
Chinese	0	1	1	3	5
Disabled	1	10	2	7	20
Dual Eligible Groups	1	2	2	6	11
Employer Related Groups	1	0	0	1	2
Family Member/Caregiver of Beneficiary	1	1	1	6	9
Filipino	1	1	0	4	6
Guamanian or Chamorro	0	0	0	2	2
Hispanic / Latino	1	11	3	7	22
Hmong	1	0	0	4	5
Japanese	0	0	1	3	4
Korean	0	0	0	2	2
Low Income	1	9	2	7	19
Medicare Beneficiaries	1	12	3	7	23
Medicare Pre-Enrollees	0	4	0	7	11
Mental Health	1	2	0	3	6
Mental Health Professionals	0	0	0	1	1
Native Hawaiian	0	0	0	2	2
Other	0	0	0	0	0
Other Asian	0	0	0	1	1
Other Pacific Islander	0	0	0	1	1
Partnership Outreach	0	0	0	0	0
Presentations to Groups in Language Other than English	0	0	0	1	1
Rural	1	0	1	2	4
Samoan	0	0	0	2	2
Social Work Professionals	0	0	0	1	1
Some Other Race or Ethnicity	0	0	1	0	1
Vietnamese	0	0	0	2	2

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#### Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	182	218	208	132	740
<b>Literature from Events</b>					
General HICAP Brochure	0	370	80	725	1,175
"Taking Care of Tomorrow"	0	0	0	0	0
Other Publications (Created by or on Behalf of Local HICAP)	0	315	20	205	540
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	0	0	0

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 11 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	78	182	134	122	516
Total Finalized Intakes	70	127	93	75	365
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	23	45	41	37	146
Aging into Medicare Postacd - CDA HICAP	3	2	0	3	8
CDA HICAP	0	1	0	0	1
CHA	0	0	0	0	0
CMS/Medicare	10	27	13	7	57
Friend/Relative	11	13	9	6	39
InfoVan	0	0	1	0	1
Internet	0	0	2	0	2
Mailings	5	2	0	1	8
Media	1	1	1	1	4
Other	5	9	6	7	27
Presentations	1	0	5	1	7
Previous Contacts	6	25	13	8	52
State Website	0	0	1	0	1
Missing/Not Collected	5	2	1	4	12
<b>Mode of Client Contact</b>					
Quick Call Contacts	13	80	53	55	201
Contacts by Telephone	33	95	59	44	231
Contacts In Person at home	2	0	2	0	4
Contacts In Person at site	80	124	79	74	357
Contacts by E-Mail	21	15	32	17	85
Contacts by Mail/Fax	8	7	5	3	23
Total Number of Client Contacts:	157	321	230	193	901
<b>Contact Status Types</b>					
General info	49	73	71	50	243
Detailed Assistance	78	135	93	85	391
Problem Solving/Resolution	35	57	26	30	148
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	0.00	0.00	0.00	0.00	0.00
Volunteer	126.48	167.16	112.11	123.38	529.13
Paid	10.59	32.02	27.40	10.14	80.15
In-Kind	0.00	0.00	0.00	0.00	0.00
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	15	7	19	10	51
<b>Race</b>					
African American/Black	5	6	1	7	19

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	1	0	1	2
Caucasian/White	42	84	66	50	242
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	0	0	0	0	0
Filipino	2	14	0	1	17
Japanese	1	1	1	1	4
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	0	0	0	1	1
Other Pacific Islander	0	1	1	0	2
Other Asian	0	0	0	0	0
Two or More Race	1	2	0	1	4
Some Other race	3	2	3	4	12
Not Collected	16	16	21	9	62
<b>Gender</b>					
Female	44	82	51	44	221
Male	23	42	39	30	134
Not Collected	3	3	3	1	10
<b>Monthly Income</b>					
Less than 150% of FPL	14	25	11	27	77
Equal To/Greater than 150% of FPL	40	67	51	34	192
Not collected	16	35	31	14	96
<b>Client Asset Limits</b>					
Below LIS Asset limit	3	3	0	4	10
At or Above LIS Asset Limit	1	1	0	1	3
Not Collected	66	123	93	70	352

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Total Clients that Checked Yes as Being</b>					
Veteran	3	3	4	3	13
Limited English Proficient (LEP)	1	5	5	2	13
Dual Eligible	6	15	16	16	53
Medicare Status Due to Disability	13	22	19	19	73
Dual Eligible due to Mental Disability	0	0	1	0	1
Applying/Receiving Social Security/Medicare Disability	11	19	17	19	66
<b>Age</b>					
Under 60	9	13	12	13	47
60-64	1	6	11	18	36
65-74	33	53	41	31	158
75-84	16	31	17	8	72
85+	8	17	7	5	37
Not Collected	3	7	5	0	15
<b>Marital Status</b>					
Married	29	56	40	28	153
Never Married	2	9	5	7	23
Separated	0	0	2	2	4
Divorced	19	19	18	20	76
Widowed	12	31	20	10	73
Domestic Partner	0	0	0	0	0
Not Collected	8	12	8	8	36
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	8	16	9	9	42
Estimated Dollars Saved	\$13,600.06	\$17,333.54	\$22,233.24	\$17,642.16	\$70,809.00

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Topics/Needs Discussed					
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	17	19	24	16	76
Benefit Comparisons/Explanation/Coverge Changes	35	46	44	35	160
Appeals/Grievances	8	4	7	2	21
Billings/Claims	6	4	6	4	20
Fraud/Abuse	1	0	0	0	1
Quality of Care	0	0	0	0	0
LTC/LTCI					
Enrollment/Eligibility Assistance	1	0	0	0	1
Billings/Claims	0	0	0	0	0
LTC Partnership	0	0	0	0	0
Appeal/Greivances	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other LTC	1	0	1	0	2
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	18	19	25	16	78
Benefit Explanation	33	49	41	35	158
Appeals/Grievances	0	1	1	0	2
Billings/Claims	3	2	1	1	7
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	0	3	0	0	3
Quality of Care	0	0	0	0	0
Plan Comparison	10	15	14	17	56
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	13	26	19	19	77
Benefit Explanation	34	68	43	40	185
Appeals/Grievances	0	1	0	0	1
Billings/Claims	2	1	1	1	5
Fraud/Abuse	0	0	1	0	1
Coverage Changes/Disenrollment	0	7	1	4	12
Plan Non Renewal	1	20	3	1	25
Plan Comparison	12	39	16	18	85
Enrollment/Enrollment Asistance	1	5	2	4	12
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	0	0	0
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	3	4	2	5	14
Medi-Cal Application Assistance	6	3	1	3	13



From: 07/01/2011 To: 06/30/2012

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	9	13	7	13	42
MSP Application Assistance	5	1	0	0	6
Medi-Cal/QMB Claims	1	0	0	1	2
Fraud/Abuse	0	0	0	0	0
Other	4	6	4	8	22
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	8	7	11	7	33
Military Benefits	3	2	6	2	13
COBRA	0	0	4	0	4
Mental Health Topics	0	0	1	0	1
Fraud/Abuse	0	0	0	0	0
Other Health Insurance	4	8	5	12	29
Other	2	3	2	1	8
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	34	55	50	32	171
Eligibility/Screening	17	27	21	17	82
Plan Comparison	18	51	26	26	121
Enrollment/Anrollment Assistance	8	6	16	1	31
Billings/Claims	0	2	1	0	3
Coverage Changes	0	4	2	0	6
Re-enrollment	0	0	0	0	0
Disenrollment	0	2	0	1	3
TROOP	0	1	0	0	1
Other	0	4	1	1	6
<b>LIS / Extra Help</b>					
Eligibility / Screening	9	23	13	19	64
Benefit Explanation	14	20	10	11	55
Application Assistance	1	22	18	13	54
Claims/Billings	0	0	1	0	1
Appeals / Grievances	0	0	1	0	1
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	3	1	1	4	9
PPARx	0	0	0	0	0
Military Drug Benefit	2	0	2	0	4
Manufacturer Program	0	0	0	0	0
Other	0	1	1	0	2
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	2	1	0	0	3
Lag Time	0	0	0	0	0
Multiple Enrollment	0	1	0	0	1
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	0	0	0	0	0

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	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	0	1	1	0	2
Dosage problem	0	0	0	0	0
Data problems	0	0	0	0	0
Delay in medications	0	0	0	0	0
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	1	0	1
Client reached donut hole	0	0	0	0	0
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	1	0	0	1
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	4	0	12	16
Cases Opened	0	0	1	0	1
Cases Closed	7	14	6	12	39
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	11	30	15	24	80
HICAP Legal Clients that Saved	0	0	4	12	16
Estimated Financial Savings	\$0.00	\$0.00	\$3,430.59	\$9,223.16	<b>\$12,653.75</b>

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### Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	0	1	0	0	<b>1</b>
Part D Plan:	0	2	0	0	<b>2</b>
SMP:	0	0	0	0	<b>0</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	0	0	0	<b>0</b>
Other:	0	2	1	0	<b>3</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>0</b>	<b>5</b>	<b>1</b>	<b>0</b>	<b>6</b>
<b>All Other Complaints</b>					
APS :	0	0	0	0	<b>0</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Other:	0	0	0	0	<b>0</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	19	20	18	17	<b>74</b>
Total duration of calls	4.17	5.49	4.00	-8.18	<b>5.48</b>